

**The End of Year Workflow Overview and Notes**

1. **Just like at Mid-Year, review your My Team list and ensure Your Manager is correct. Before attempting to start - Have your team alert you when they have completed their updates in the progress notes**
2. Review the notes and assign ratings, after Saving Submit for Approval. An email will alert you make the ratings visible, meet with your employee and remind them to complete the End of Year attestation, when you receive the email notification of the submission, reviews and click for the final approval.
3. **The importance of the manager/employee review cannot be understated.** Good progress notes will streamline the conversation and assist in planning for the next year's goals. Review that section for sure!
4. **"Catching Up"** For users recently joining the goal setting process, get them approved so they will be able to join the Year-end process in a timely manner.

#	<b>MANAGER/FACULTY-MANAGER: Review and Add an End of Year Progress Note</b>
1.	From the top <b>Navigation</b> bar click Progress Notes.
2.	Click <b>My Team</b> and then the employee's name.
3.	Click the <b>New Progress Note box</b> select the Type from the drop down – <b>End of Year</b> , give it a Title, and add your comments under <b>Description</b> . Click <b>Next</b> .
4.	To add documentation, click <b>Upload</b> and select the file to load. This may be a PDF that supports the note.
5.	Also review any notes that may have been placed in the In-line Comments.

#	<b>MANAGER/FACULTY-MANAGER: Reviews and Assigning Ratings and Submits for Second Level Sign-off</b>
1.	Manager opens the employee's goal plan
2.	Review the <i>Progress Notes</i> and In-line Comments
3.	Post End of Year comment in Progress Note
4.	Click on the Development Goal <i>Edit</i> box. Assign a rating from the dropdown box. Click <i>Save</i> .
5.	Click on the Performance Goal Edit box. Assign a rating from the dropdown box. Click <i>Save</i> .
6.	Click <i>Submit for Approval</i> to send it to your Manager

#	<b>SECOND-LEVEL MANAGER: Reviews and Approves</b>
1.	Second Level Manager will receive an email
2.	Follow the email link to open the employee's goal plan
3.	Review the Goals and Progress Notes. If you agree with ratings Click <i>Approved</i> .
4.	If not Reject and return for modification with comments. <b>Comments will go to the Manager's email and are not seen by the employee.</b> The Manager will need to Resubmit).

#	<b>MANAGER/FACULTY-MANAGER: The Schedule the Meeting and open the Employee View</b>
1	The Manager receives an email of the Approval.
2	Schedule to meet with your direct report.
3	Follow the email link to open the employee’s goal plan.
4	At least 24 hours prior to the meeting, click the <i>Employee to View</i> button to Yes to open the view for the direct report to see the ratings.

#	<b>MANAGER/FACULTY-MANAGER: The Meeting to Review the Goals</b>
1.	At the Review Meeting discuss: <ol style="list-style-type: none"> <li>1. Progress of the Development and Performance Goals</li> <li>2. The ratings on all the goals, and the overall rating</li> <li>3. Their on-going development</li> <li>4. Discuss the next year’s SMART goals</li> </ol>
2.	Plan with them to have the Goals Entered and Submitted for Your Approval during the Goal-Setting phase. (July 1 to August 30)
3.	Remind them to complete the attestation, Save and Submit for Approval.

#	<b>MANAGER/FACULTY-MANAGER: Approving the End of Year</b>
1.	The manager receives an email and a notice in their notification bell.
2.	Once submitted the goal plan is locked, if their comments need revision, you will need Reject.
3.	If approved the plan is locked until it opens again for Year-End.
4.	Reject will unlock it to re-open the plan for revision. The plan will need to be re-submitted to be approved.

## Resources

Performance Management Website

Visit: <https://discover-uhr.rutgers.edu/performance-management/home>

Or Under “Help” in the Application URL: <https://rutgerstalent.force.com/>

Need Assistance? Email: [performancemanagement@hr.rutgers.edu](mailto:performancemanagement@hr.rutgers.edu)